



CPO TNSmartShop Participant's Guide

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This training is focused on teaching users who will be using TNSmartShop for day to day purchasing. This training assumes that the user has basic knowledge of current purchasing processes and policies.



Internet Explorer is the internet browser that best supports TNSmartShop.

Objectives

- Administrate and use TNSmartShop for purchasing all contract and non-contract items that are located in the Edison item master, excluding generic assets.
- Successfully navigate through the TNSmartShop interface.
- Learn the shopping basics of TNSmartShop.
- Learn to use quick orders.
- Learn to use saved carts.
- Use the cart check out feature to bring the items selected in TNSmartShop into a requisition.

What is TNSmartShop?

TNSmartShop is an intuitive online repository for procurement personnel designed to improve visibility, access and the utilization of statewide contracts. For internal users it will also include the contract and non-contract items that are located in the item master, excluding generic assets.

The Benefits of Using TNSmartShop

- It allows you to create a requisition with multiple suppliers.
- It allows you to automatically dispatch purchase orders to a supplier.
- It allows you to search across multiple suppliers and catalogs.
- It allows you to save commonly purchased items in a saved cart.
- There is an item comparison feature, allowing you to compare all items in TNSmartShop.

Creating an Edison Requisition using the TNSmartShop Web Tab

To create a Requisition, you must first be logged in to Edison. Once logged in you can navigate to creating a requisition by following the links below.



1. Click **FSCM**.
2. Click **eProcurement**.
3. Click **Create Requisition**.

Define Requisition

This is the main page for creating a Requisition, and has links that will go to the various sections that need to be completed. The sections are grouped under three main tabs, and are highlighted in yellow.

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 32101 General Services

*Requester: TN2_PU_EPRO_AGENCY_REQUESTOR TN2_PU_EPRO_AGENCY_REQUESTOR *Currency: USD

1 Requisition Name: 2 Doc Type: Priority: Medium

3 Continue

Confirm that you **business unit** and your **requester** have defaulted correctly.

1. Enter a **Requisition Name** that will be easy for you to identify for future use.
2. Enter the **Doc Type**.
3. Click **Continue** to be automatically be brought to the **Add Items and Services** tab.

Add Items and Services

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information n to procure each item or service.

Search: Search

Catalog Favorites Templates Services Forms Web Special Request

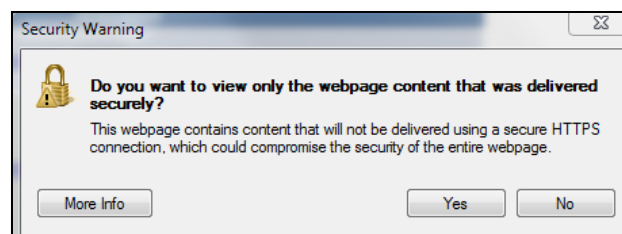
TNSmartShop

TNSmartShop Direct connect

1. Click on the **Web** tab and select the **TNSmartShop Direct Connect** link. This will open up the TNSmartShop screen.



*When you receive the security warning asking “Do you want to view only the webpage content that was delivered securely?” click **NO**.*



Navigating to TNSmartShop for Local Entity Users

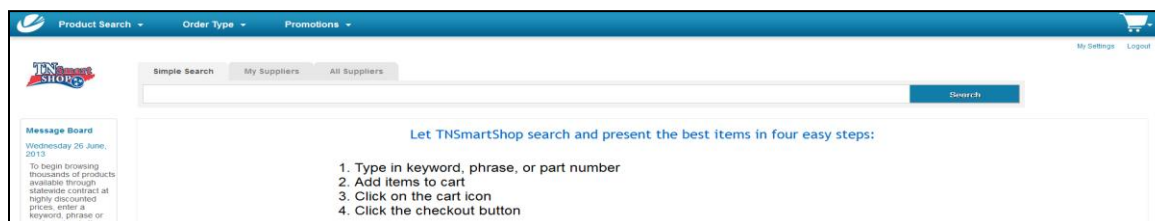
For local entity users click on the link that is provided below to access TNSmartShop. Login using the User ID and Password you received when you registered.

<http://tn.vinimaya.com/vmkt61/vslogin.do?companyid=STTN>

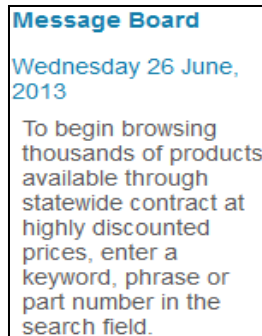


TNSmartShop Home Screen

TNSmartShop is designed to be a process similar to online shopping. The home screen is used for searching. Items can be searched for by keyword, supplier part number, manufacturer part number or Edison ID. Along the top of the screen are additional features including: product search, order type, promotions, and your cart.



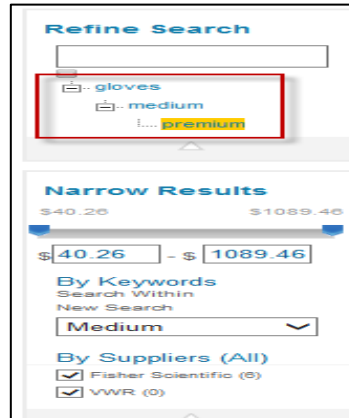
The home screen contains two message boards, one along the left side of the screen and one in the area below the search bard. Message boards allow system administrators to present information about TNSmartShop.



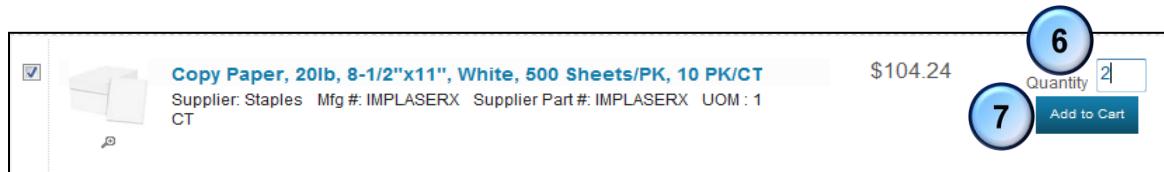
Selecting Items for Order

HINT Using the search formula below is the fastest way to find items in TNSmartShop.

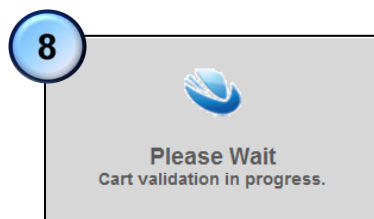
1. Click on the **All Supplier** link to search for your item.
2. Select the **Buyer Part #** radio button
3. Select the **All** checkbox to select the Contract Items and Non-Contract items
4. Type the Edison ID number into the search field.
5. Click **Search** to search for the item.



If necessary the results can be filtered using the actions on the left side of the screen. Enter additional search words in the Refine Search field to narrow down the selection. An example is included of refining the search from gloves, including medium, and then premium. The filter can also be used for price of items, by selecting a range of price for the item. Items can be sorted by price either low to high or high to low. There is drop down menu with keywords that are relative to the items. The results can also be narrowed by deselecting any unwanted suppliers.





6. Enter the correct quantity.
7. Click Add to Cart.
8. A pop-up will appear saying "Please Wait Cart Validation in Progress". Wait until this pop-up goes away to proceed.



Repeat steps 2-7 to add all necessary items to the cart.


HINT To add more than one item at time the user can put the quantity in all of the desired fields and then click Add to Cart at the top of the screen.


			Add to Cart	Save as Favorite	Export
Showing 1 - 20 of 54 20 per page 1 2 3					
Product		Price	Add To Cart		
	Duro General 1/6 Barrel Paper Bag Supplier: American Paper and Twine Mfg #: DRO80076 Supplier Part #: 105205 UOM : 1 BL	\$30.78	Quantity <input type="text" value="2"/>	<input type="button" value="Add to Cart"/>	
	Duro 8 lb General Paper Bag Supplier: American Paper and Twine Mfg #: DRO80957 Supplier Part #: 123604 UOM : 1 BL	\$40.74	Quantity <input type="text" value="2"/>	<input type="button" value="Add to Cart"/>	

Once you click Add to Cart, the screen will refresh and provide you with a confirmation that the items have been added to your Shopping Cart. This message also provides a link to the shopping cart if the user is done shopping.

Item(s) successfully added to cart. ([Click here to view your cart](#))

Once all necessary items have been added to the order go to your cart to finalize the order.

9. Click on the  icon. This will bring the user to the cart summary screen.

				10
<input type="button" value="Save Cart"/>		<input type="button" value="Compare"/>	<input type="button" value="Export"/>	
		<input type="button" value="Remove All"/>	<input type="button" value="Continue Shopping"/>	<input type="button" value="Update Cart"/>
		<input type="button" value="Checkout"/>		
Product		Price	Extended Total	Update Cart
Your Cart Total is \$118.80				
	Georgia-Pacific Spectrum Recycled 3-Hole Copy Paper Supplier Name: American Paper and Twine Mfg: Mfg #: 999917 Supplier Part #: 561680 UOM : CA	\$29.70	\$59.40	Quantity <input type="text" value="2"/> <input type="button" value="Remove"/>

From this screen you will be able to change quantities or remove items from your cart. When updating any cart information it is important to click Update Cart. This cart can also be saved for later use by clicking Save Cart.

10. Click Checkout to return to the Edison Add Items and Services screen.

Review and Submit

1

Create Requisition

1. Define Requisition

2. Add Items and Services

3. Review and Submit

- Click on the Review and Submit tab to finalize your requisition.

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	1000141547Georgia-Pacific S	American Paper & Twine Co	2.0000	Case	29.700	59.40
2	1000012001Georgia-Pacific S	American Paper & Twine Co	2.0000	Case	29.700	59.40

2

☒ Select All / Deselect All

Add to favorites

Modify Line / Shipping / Accounting

Delete

Total Amount: 118.80 USD

- Click the Select All/Deselect All link to select all lines.
- Click the Modify Line/Shipping/Accounting link.
- Enter Shipping information in the Ship To field.
- Enter all necessary accounting codes in the Accounting Information field.
- Click Apply.
- Select which lines the information applies to.
- Click OK.

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID:

Vendor Location:

Buyer:

Category:

Shipping Information

Ship To:

[Modify Shipping Address](#)

Due Date:

Attention:

Accounting Information

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

[Load Values From Defaults](#)

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information
Percent	GL Unit	Account		
1	32101			

4

Ship To:

5

6

Distribution Change Options

For the selected requisition lines, apply distribution changes to:

☒ All Distribution Lines
Apply changes to all existing distribution lines.

☐ Matching Distribution Lines
Apply changes to each existing distribution line by matching the distribution line numbers.

☐ Replace Distribution Lines
Remove the existing distribution lines and replace with the distribution lines changes.

Justification/Comments

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

Enter all necessary Justifications and Comments for the requisition.

Click Save & Preview Approvals.

9. Write down the requisition id.
10. Click Check Budget.
11. Click Submit.

The process is now completed and the purchase order/purchase orders will automatically dispatch to the vendor/vendors.

Confirmation

Requested For:	tn_dgs00	Number of Lines:	1
Requisition Name:	outboard motor-nashville	Total Amount:	30,000.00 USD
Requisition ID:	0000021249	Justification:	training-ac
Business Unit:	32101		
Priority:	Medium		
Budget Status:	Not Checked		

Submit Edit Requisition Apply Approval Changes Check Budget

Navigating to Direct Connects

Effective October 1st 2013, TN Smart Shop direct connect link found on the web tab in the Edison eProcurement module now combines all existing punch-out suppliers into a single online repository for an easy to use option for catalog purchasing. This means that the web links for the punch-out suppliers will now be located in TN Smart Shop.

1 FSCM

- ▷ Supplier Contracts
- ▷ Items
- ▷ Vendors
- ▷ Purchasing
- ▷ Inventory
- ▽ eProcurement
 - ▷ Buyer Center
 - Create Requisition

1. Click FSCM
2. Click on E-procurement
3. Click on Create Requisition
4. Click on Add items and Services

Create Requisition

1. Define Requisition 2. Add Items and Services

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Services Forms Web Special Request

Browse Catalog

*Select a catalog: All Procurement Items

☐ Left ☐ Right ☐ All Procurement Items

- Choose from a catalogs in the
- Navigate categ clicking folders
- View items in a

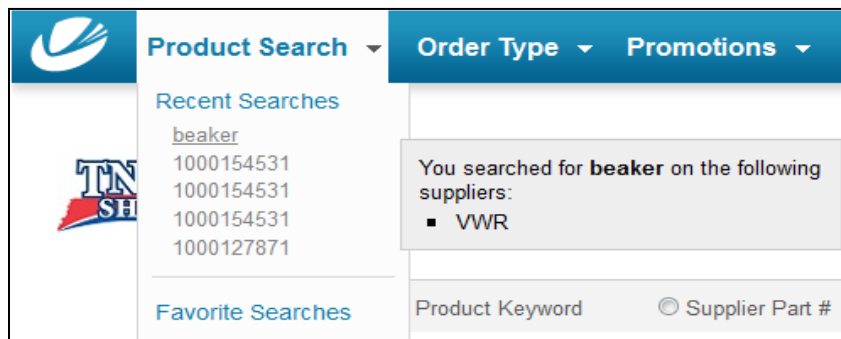


1. Click on the “Web” tab
2. Click on the TNSmartShop Link
3. Click on the “Go to site” link for the vendor’s site you wish to visit.

The screenshot shows the search interface of the TNSmartShop website. At the top, there are three tabs: 'Simple Search', 'My Suppliers', and 'All Suppliers'. The 'All Suppliers' tab is selected. Below the tabs is a search bar with a 'Search' button. Below the search bar are five radio buttons for search criteria: 'Product Keyword' (selected), 'Supplier Part #', 'Manufacturer Part #', 'Buyer Part #', and 'Search Internal Catalogs'. Below the search criteria are three sections: 'Select a Category.', 'Select a Supplier.', and 'Search Within'. The 'Select a Category.' section has a 'Type to Filter:' input and a 'Reset' button, with a list of categories including 'All', 'Item Master Catalogs', 'Office Supplies', 'Laboratory Supplies', 'MRO Supplies', and 'Medical Supplies'. The 'Select a Supplier.' section has a 'Type to Filter:' input and a 'Reset' button, with a list of suppliers including 'All', 'American Paper and Twine (Go to site)', 'Contract Item Catalog', 'Fisher Scientific (Go to site)', 'Grainger (Go to site)', 'Medline (Go to site)', 'Non-Contract Item List', 'Staples (Go to site)', 'testy LC', and 'VWR (Go to site)'. The 'Search Within' section has a 'Remove All' link and a blue circle containing the number 3 next to it.

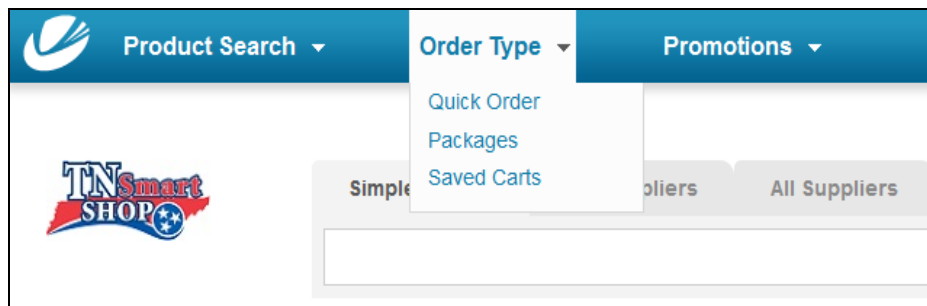
Product Search Dropdown

This dropdown menu is used to show recent searches as well as saved searches. Click on the searches to run them. To see which supplier has been used in the same search, hover over any of the recent searches.



Order Type Dropdown

This dropdown menu is used to access Quick orders, Packages, and saved carts. These functions provide additional ordering options. Quick order allows the user to create a personal list, if the supplier or manufacturer part number is already known, without searching. The Packages feature allows the user to create a package of commonly ordered items. The Saved Cart feature allows the user to save a cart for future use, as TNSmartShop will not automatically save the items for the user.



Quick Orders

Quick Orders are NOT used at this time. Use the Saved Carts feature for repetitive orders.

Packages

Packages are NOT used at this time.

Saved Carts

Saved carts can be used in many ways including: storing frequently used items to reduce shopping time, beginning the process and completing it later, and cart sharing. Carts are saved

from the main cart screen by clicking the Save Cart button. To save a cart it must have a Cart Name and Cart Description. Enter this necessary information and then click Save Cart.

Add To Existing Saved Cart

Save Cart

Add to Saved Cart

Cart Name:

Cart Description:

To save to an existing cart click the Add to Existing Save Cart button. Select a saved cart from the dropdown menu and then click Update Saved Cart.

Saved Carts

Update Saved Cart

Saved Carts > Add To Existing Saved Cart

Select a Saved Cart

A message will then display telling the user that the cart has been saved.

Save Cart

Compare

Export

Remove All

Continue Shopping

Update Cart

Checkout

Cart Saved Successfully

Product

Price

Extended Total

Update Cart

To locate a saved cart click on the cart icon and click on saved carts or the desired saved cart if it is available. Below is an example of what the saved carts list looks like. Clicking the person icon shares the cart, clicking the pencil icon allows the user to edit the cart, and clicking the X icon deletes the cart.

2 items













\$143.04

View Cart


Last Active Cart

Saved Carts

Paper

Saved Carts				
Click on the saved cart name to view its contents. Note: Item(s) being added to the cart from the supplier's website, which do not have a corresponding SmartSearch agent will be dropped from the cart.				
Line	Cart Name	Creation Date	Cart Description	Action
1	alison test	02-22-2013 16:13:19	-	  
2	bhavanakawadi	03-01-2013 01:01:13	-	  
3	saved caert	03-01-2013 02:38:07	-	  
4	Test saved cart	03-01-2013 04:30:40	-	  

Sharing Carts

To share a cart, click on the Share Cart icon. 

Enter the user's email and then click

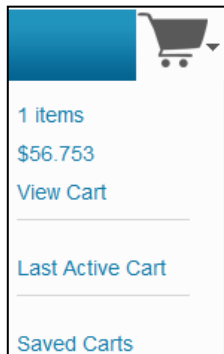
the Share button. Users can also be added to the Users list by entering their email and clicking Add to List.

Share Cart
[Saved Carts](#) > Share Cart
Cart Name: Paper
Cart Description: Paper
Share With
Email:
Users List:

HINT

Edison cart sharing is only available between users with valid email addresses in the Edison system. To verify that your email is entered correctly in Edison follow the provided navigation.

[Favorites](#) [Main Menu](#) > [My System Profile](#)





Shopping Cart Icon

Hover over the shopping cart icon to view the number of items and the dollar value of the items in the current cart. This feature also allows you to view your Last Active Cart, which is the last cart you checked out. If you want to reorder the same items from your last purchase this is the quickest way to do so. The Saved Cart feature is also here, this can be used to quickly reorder items that are frequently bought.

Viewing the Shopping Cart

By clicking directly on the cart icon the user can use a variety of features. The Save Cart feature allows you to save the contents of the cart and use them for or add them to future purchases. The Compare feature allows the user to compare items that are checked. You can also remove all items or remove items individually. The Continue Shopping and Update Cart features are also used on this screen. Click the Checkout button allows you to return to the Edison requisition with all of the selected items. These items will become lines.

Save Cart Compare Export			
Remove All Continue Shopping Update Cart Checkout			
Product	Price	Extended Total	Update Cart
Your Cart Total is \$16.70			
 Replacement Printer Paper, For Use With 2GE32, Package Quantity 3  Supplier Name: Grainger Mfg: DEFELSKO Mfg #: THERMAL PRINTER PAPER Supplier Part #:2GE36 UOM : EA	\$16.70	\$16.70	Quantity <input type="text" value="1"/> Remove
Your Cart Total is \$16.70			

HINT For local entities the checkout feature will also be used. When clicking checkout it will provide the user with a spreadsheet.

My Settings

Click on the [My Settings](#) link to be brought to the Preference screen. This screen will allow the user to adjust settings.

Preference					
Search Types					
<input checked="" type="checkbox"/> Product Keyword	<input checked="" type="checkbox"/> Supplier Part #	<input checked="" type="checkbox"/> Manufacturer Part #	<input checked="" type="checkbox"/> Buyer Part #	<input checked="" type="checkbox"/> Search Internal Catalogs	
Menu Settings					
<input checked="" type="checkbox"/> e-Forms	<input checked="" type="checkbox"/> Quick Order	<input checked="" type="checkbox"/> Favorites	<input checked="" type="checkbox"/> Packages	<input checked="" type="checkbox"/> Saved Carts	<input checked="" type="checkbox"/> Use Default PCard
Default Settings					
Default Search Type:	<input type="text" value="Product Keyword"/>				
Default Search Results View:	<input type="text" value="Condensed View"/>				
Default Language :	<input type="text" value="English"/>				
Default Search Page View:	<input type="text" value="Simple Search"/>				

Using the Search Tabs

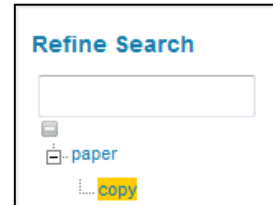
There are three options when searching using TNSmartShop. The **first search option** is the **Simple Search** which will intelligently search based upon previous search results. This search allows the user to put in the description of the item that they are searching for and then click search. The user can also enter the Supplier part number, Manufacturer Part number, or the Edison Item ID as search criteria.

Simple Search	My Suppliers	All Suppliers
<input type="text"/>		<input type="button" value="Search"/>

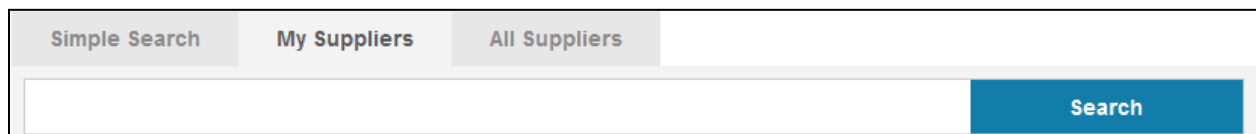
HINT

The simple search will only pull items that have been purchased on TNSmartShop before, meaning that it may not pull every item that is available to the user. The Simple Search will get smarter the more TNSmartShop is used.

When completing a Simple Search it will pull all results for every word that is search. The best way in which to use simple search is to search for a main word and then use the Refine Search box to limit the results that are given.

A screenshot of the 'Refine Search' interface. It features a title 'Refine Search' in blue. Below the title is a search input field. Underneath the field, there are two filter options: 'paper' with a document icon and 'copy' with a document icon and a yellow highlight.

The **second search option** is **My Suppliers**. This option allows you to save which suppliers you would like to search from.

A screenshot of a search interface with three tabs: 'Simple Search', 'My Suppliers', and 'All Suppliers'. The 'Simple Search' tab is selected. Below the tabs is a search input field and a blue 'Search' button.

When first using this screen it will be necessary to select any of the suppliers that you want to search and then click add to my suppliers. This will populate all of the selected suppliers on the My Suppliers screen. The Edit List feature allows you to edit the list, and the Reset Portlets feature allows the user to keep the changes.

A screenshot of the 'Add a supplier' screen. On the left, there is a list of suppliers with checkboxes: American Paper and Twine, Fisher Scientific, Grainger, Medline, Staples, and VWR. Below this list is an 'Add to My Suppliers' button. On the right, there are two sections: 'Laboratory Supplies' and 'Office Supplies'. Each section contains a list of suppliers with checkboxes and a yellow notepad icon. At the top right, there are 'Reset Portlets' and 'Edit List' buttons.

HINT

If the supplier has a yellow notepad icon next to it the user can click on it to receive additional information about the vendor. It contains vendor contact info, a copy of the contract, terms and conditions and specifications (when applicable).

The **third search option** is **All Suppliers**. This is the search method that should be used, as it is the most effective.

A screenshot of a search interface with three tabs: 'Simple Search', 'My Suppliers', and 'All Suppliers'. The 'All Suppliers' tab is selected. Below the tabs is a search input field and a blue 'Search' button.

This search allows the user to search one or more suppliers using any of the following criteria:

Select a Supplier.

Type to Filter:

- ☐ All
- ☐ American Paper and Twine ([Go to site](#))
- ☐ Fisher Scientific ([Go to site](#))
- ☐ Grainger ([Go to site](#))
- ☐ Medline
- ☐ Staples ([Go to site](#))
- ☐ VWR ([Go to site](#))

☒ Product Keyword
 ☐ Supplier Part #
 ☐ Manufacturer Part #
 ☐ Buyer Part #
 ☐ Search Internal Catalogs

Product Keyword: A Word(s) from the Product Description

Supplier Part #: Supplier Item ID

Manufacturer Part #: Manufacturer Item ID

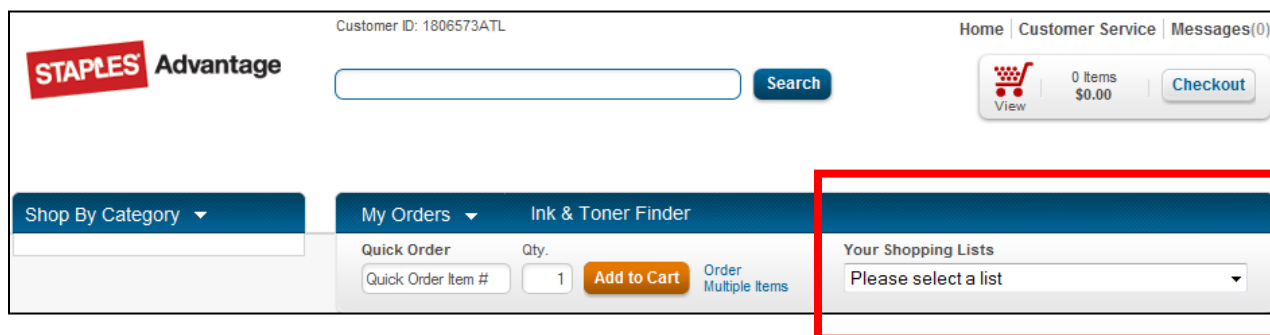
Buyer Part #: Edison item ID

Search Internal Catalogs: Search Edison Item Master and Hosted Vendor Catalogs (Vendor supplied catalogs whose items are not in the Edison Item Master)

TNSmartShop displays an icon for market basket or preferred items. Please see the green icon above the item description in the example below. For more information on the core/market basket items for each contract, contact the contract administrator.

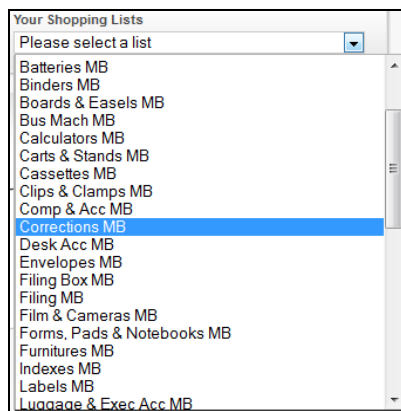


STAPLES



On the Staples website go to the Your Shopping Lists feature. This feature has all market basket items list be category. Select the category for your item and a list will populate with all market basket items for that specific category.

Once an item is selected, Staples indicates Market Basket items for TNSmartShop users using this icon.



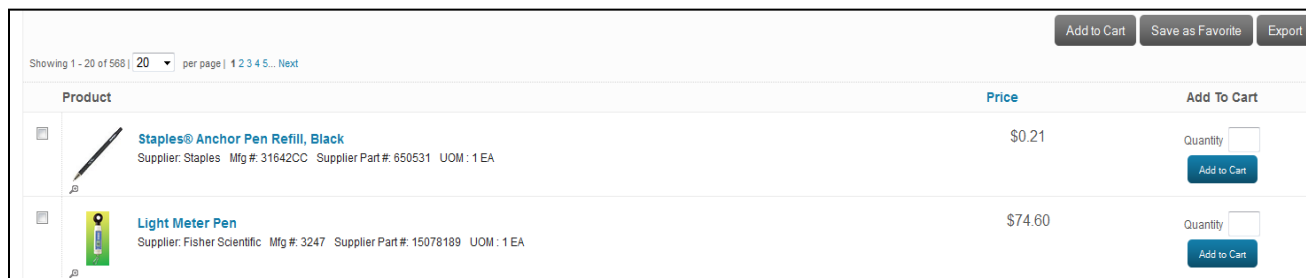
Click on the



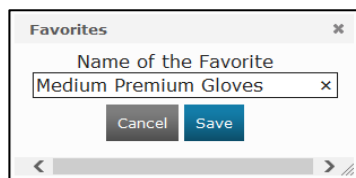
link to return to TNSmartShop.

Saving a Search to Favorites

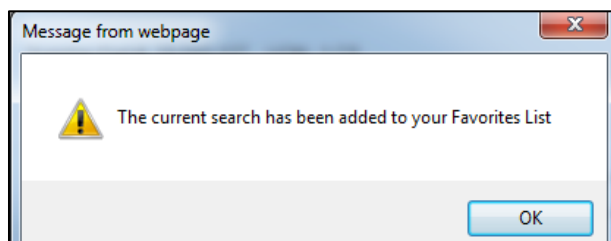
If the user expects to perform the same search and filter choices often, it can be saved for reuse. Once the search has been completed and the filters set click on the Save as Favorite link.



After click the Save as Favorites button a box will pop up allowing you to name the search. Name the search and then click Save.



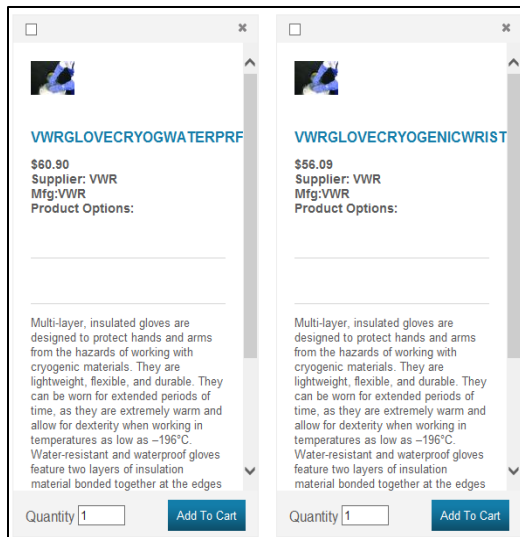
An additional pop up will appear tell the user that “The Current search has been added to your Favorites List”.



Comparing Items

Regardless of the search that is being done after pulling items they can be compared. To compare the item either drag the item image into one of the blank compare boxes, or check the box next to an item. Then click the compare button.





Comparing items will show more details about each item so you can more closely examine the differences between the items. From this screen you can either click Add To Cart or you can return to the search results.

Logging Out

To log out of TNSmartShop without bringing any items into the requisition, click on the Logout link in the top right corner.

